

PRESOLICITATION NOTICE

DHS OTIS ADVISORY MULTI-STEP DOWNSelect INVITATION

1.0 INTRODUCTION

The Department of Homeland Security (DHS) is conducting a procurement for the operational support services necessary to support the mission execution of its Office of Intelligence & Analysis (I&A). The overall procurement is named Organizational, Training, and Intelligence Services (OTIS).

The OTIS requirement is divided into three functional categories, with the intent to solicit, evaluate, and award per the following:

Functional Category	Request For Proposal/Socio-Economic Goals	Single/Multiple Awards	Contract Type	Work Tasked by
1.Organizational Management Support (OMS)	Full and Open Competition	Single Award	IDIQ	Task Orders
2. Core Intelligence Services	Two tracks- Small Business Set-Aside and Full and Open Competition	Multiple Awards*	IDIQ	Competitive Task Orders
3.Training Services	Two tracks- Small Business Set-Aside and Full and Open Competition	Multiple Awards*	IDIQ	Competitive Task Orders
* The Government intends to award three contracts for each track, but reserves the right to increase/decrease that number based on the evaluation results and the best interests of the Government.				

Offerors may propose for consideration in one or more functional categories with the submission of a separate and complete proposal for each functional category in which they wish to be considered. Award selections for each functional category will be made after all proposals for all categories are evaluated. The OMS awardee and any of its subcontractors/teaming partners are precluded from performing in the other two categories in any capacity, just as any awardees (and their subs or teaming partners) from the other two categories are precluded from performing in the OMS category.

2.0 NOTICE TO INTERESTED VENDORS

This is a presolicitation notice, in accordance with FAR Part 15.202 Advisory Multi-Step Process, encouraging vendors interested in submitting a proposal in response to the RFP, to submit information that will allow the government to advise them about their potential to be viable competitors during the formal solicitation, evaluation, and selection processes. Response to this invitation is accomplished at minimal cost to the vendors and the government by asking the vendors to submit limited information as indicated in this document that focuses on (1) relevant organizational experience; (2) successful experience performing performance-based federal government contracts; and (3) the vendor's institutionalized quality management processes and methodologies.

The government will evaluate all responses in accordance with the criteria specified in this document and advise each respondent in writing either that it will be invited to submit a proposal in response to the RFP or, based on the information submitted, that it is unlikely to be a viable competitor.

Notwithstanding the advice provided by the government in response to their submission, vendors identified as unlikely to be viable competitors may still submit a proposal for evaluation in response to the RFP as long as they recognize the inherent risks of doing so. In addition, vendors identified as unlikely to be viable competitors may be proposed as subcontractors or teaming partners of vendors interested in participating in the formal solicitation process. In the interest of promoting optimum participation, the government intends to publish the list of vendors invited to submit proposals as soon as written notifications of the results of this presolicitation response have been made.

3.0 DESCRIPTION OF THE FUNCTIONAL CATEGORIES

3.1 Functional Category 1—Organizational Management Support (OMS)

3.1.1 Scope of Work

The scope of the activities to be performed under this contract is described below for each functional category. The work described should not be construed in any way to be an outsourcing of inherently governmental functions. It is work that supports government personnel in the performance of their duties. Contractor personnel will not be in a position of decision-making authority that would bind the Government to take or not to take some action by contract, policy, regulation, monetary or otherwise.

3.1.1.1 Policy Support: DHS I&A requires support for policy development within I&A and across the DHS intelligence enterprise. The contractor may be required to provide:

- a) Assistance and advice to the government related to the development and execution of homeland security related policy, such as analysis of the impact of policies on the DHS Intelligence Program; development of options, and alternatives; assessment of the consequences of various proposed courses of action
- b) Monitoring and analyzing DHS and Intelligence Community (IC) plans, directives and courses of action (COAs) and conducting research on policies relevant to homeland security
- c) Monitoring and analysis of related legislative and policy proposals, including appropriate statutory, regulatory, and other issues pertaining to I&A programs
- d) Assistance with problem definition, planning and coordination efforts with numerous organizational elements
- e) Special analyses and briefings as needed, including writing concept and issue papers to support policy development

3.1.1.2 Planning, Programming and Performance Management

Support: DHS I&A requires support for planning, programming and performance management within I&A and across the DHS intelligence enterprise. The contractor may be required to provide support to:

- a) Development of I&A's annual Future Years Homeland Security Program (FYHSP), including support to strategic planning, development, presentation, and defense of I&A's FYHSP
- b) Assisting with I&A's strategic planning efforts
- c) Integration of strategic planning, programming and budgeting/execution activities, to promote consistency between such related efforts
- d) Efforts to integrate performance and budget integration efforts, including facilitating program reviews, cross-departmental analysis of DHS intelligence investments, and capturing best practices and lessons learned
- e) Development and monitoring of performance goals, including coordinating and monitoring proper development, tracking, and reporting of performance goals; determining; the effectiveness of performance measures and making recommendations to ensure performance measures are properly aligned with strategy

3.1.1.3 Resource Management Support: The Contractor shall provide professional-level support services in all aspects of budget, resource management and financial analysis with responsibility for performing a full range of reviews and analytical functions in support of formulating, planning, presenting, and executing the assigned budgetary appropriation. All such support shall be performed in accordance with applicable federal and DHS statutes, regulations, directives, policies, and

guidelines. Specific activities supported may include but are not limited to:

- a) Collecting, analyzing, preparing and presenting financial data related to all aspects of the budget life cycle including planning, formulation, reclama, and execution
- b) Collecting, compiling, forecasting and analyzing financial management data to define, defend and justify resource allocation funding levels of current and out-year apportionments in support of or against financial decisions at all levels
- c) Conducting financial and budget trend analysis and studies
- d) Monitoring, extracting and analyzing budgetary data from the financial management system
- e) Assisting with monitoring, tracking and reporting on the performance of contracts including current project status, staffing rates, deliverables, the need for funding adjustments as defined by the contract's execution rate, obligation rates, expenditures, and performance measures
- f) Facilitating the review and processing of travel authorizations, vouchers and invoices for certification and payment
- g) Assisting in the development of briefings and executive decision papers on financial performance data to address internal and external inquiries

3.1.1.4 Human Capital Resources Support: The Contractor shall provide professional-level services in support of all aspects of human resource planning, management, and operations. All such support shall be performed in accordance with applicable federal and DHS statutes, regulations, directives, policies, and guidelines. Specific activities supported may include but are not limited to:

- a) Executing and recording/data capture of employee personnel actions such as appointments, details, promotions, awards, transfers, and separations
- b) Recommending and implementing Human Resource-specific processes and procedures
- c) Developing hiring and recruitment strategies
- d) Conducting pay and performance management
- e) Developing position descriptions
- f) Developing policies, studies, and reports on Human Capital programs and initiatives

3.1.1.5 Security Support: The Contractor shall provide professional-level support services in all disciplines of security management to include administrative, personnel, industrial, physical, communications, information and operations security. The Contractor shall assist with the

responsibility of providing oversight necessary to assure the protection of assets, classified and sensitive but unclassified information in accordance with applicable federal and DHS statutes, regulations, directives, policies, and guidelines. Specific activities supported may include but are not limited to:

- a) Ensuring compliance with mandated requirements
- b) Developing policy and programs
- c) Implementing operational procedures and guidance

3.1.1.6 Administrative Support: The Contractor shall provide both professional-level and administrative-level direct and indirect support services to the Senior Leadership Team. All such support shall be performed in accordance with applicable federal and DHS statutes, regulations, directives, policies, and guidelines. Specific activities supported may include but are not limited to:

- a) Developing and implementing task management processes and procedures
- b) Monitoring and tracking all internal and external tasking, actions and interactions
- c) Monitoring, tracking and managing correspondence
- d) Determining and preparing appropriate correspondence responses
- e) Establishing and implementing procedures for the proper handling of intelligence information which may impact national security interests
- f) Conducting daily liaison with DHS components, HQ staff, and other government officials
- g) Performing filing, faxing, copying/reproducing, scanning, correspondence delivery, archiving, and shredding, etc.
- h) Meeting and conference room management and facilitation
- i) Proposing and supporting staffing policies and procedures

3.1.1.7 Logistics and Facilities Management Support: The Contractor shall provide professional-level and administrative-level services in support of all aspects of the Logistics and Facilities Management disciplines. All such support shall be performed in accordance with applicable federal and DHS statutes, regulations, directives, policies, and guidelines. Specific activities supported may include but are not limited to:

- a) Planning, designing, managing, operating and maintaining reliable and efficient systems, equipment and logistics infrastructure
- b) Providing technical and support services involving facilities research, engineering, design, integration, and installation
- c) Designing, redesigning, evaluating and conducting assessments in support of developing specific requirements according to staff needs and

agency growth (may require CAD drawing and blue print development, etc.). Must have ability to understand and facilitate requirement's needs associated with minor construction and architectural engineering

d) Ensuring compliance with and achievement of mandated logistics and facilities requirements

e) Transporting and accounting of supplies and equipment

f) Evaluating, recommending, and planning facilities and logistics projects

g) Escort duties to facilitate the movement of uncleared personnel within secure areas

3.2 FUNCTIONAL CATEGORY 2--CORE INTELLIGENCE SERVICES

3.2.1 Scope of Work

3.2.1.1 Intelligence Analysis

DHS' Office of Intelligence and Analysis (I&A) is responsible for creating a wide-range of assessments, forecasts, and strategic warning items from all sources of information on all threats to the Homeland, and sharing those products with state and local governments as well as with the private sector. Assessments must be written at the lowest classification level so they may be shared with the broadest possible audience. Analysts shall develop rigorous analysis using a variety of analytic techniques to challenge accepted beliefs and conclusions, better qualify estimates of threat capabilities, and provide actionable insights to protect the Homeland. Analytic products will achieve the standards of tradecraft as identified in the Intelligence Community Directive 203, *Analytic Standards*. Intelligence analysis support described below includes all production management tasks related to such intelligence support, including editing, formatting, tracking, dissemination, storing, and archiving intelligence products; as well as maintaining I&A websites, soliciting customer feedback, evaluating the products, and recommending ways to improve the value of intelligence products.

The Contractor may be required to provide ***Current, Crisis, and Surge intelligence Support*** which includes:

- a) Monitoring information and intelligence from the Intelligence Community (IC), Law Enforcement agencies at all levels of government, open sources, and public and private sector sources for items of interest and threat,
- b) Providing 24x7 indications and warning analysis on threats to the Homeland.
- c) Harvesting and processing raw intelligence information from DHS component operations, investigations, sources, and contacts to the intelligence, policy, and law enforcement communities into written Homeland Intelligence Reports (HIRs).
- d) Creating current intelligence analysis products and daily intelligence updates.
- e) Creating short-term, focused analysis and assessment of terrorist organizations, their leadership, intentions, activities, capabilities and support structures.
- f) Providing initial assessment of the potential impact on the Homeland from identified threats.
- g) Sharing warnings, analysis, and assessments with DHS senior leadership and Components, DHS' Federal, State, Local, Tribal, and Private Sector partners, and the IC.

The Contractor may be required to provide ***Strategic and In-Depth Analytic Assessments*** and ***Estimates or Predictive Analytic Assessments***, which includes:

- h) Monitoring and analyzing information and intelligence from the Intelligence Community (IC), Law Enforcement agencies at all levels of government, open sources, and public and private sector sources for items of interest and threat to the Homeland.
- i) Providing intelligence subject matter expertise, including analytic methodologies and tradecraft; adversary tactics, techniques, procedures and culture.
- j) Longer-term, all-source analysis and assessments of all threats to the Homeland, including in-depth assessment of the potential impact on the Homeland from identified threats.
- k) Strategic risk assessments and Critical Infrastructure/Key Resources risk assessments.

3.2.1.2 Collection Requirements Support:

I&A establishes and manages homeland security-related intelligence collection requirements, and develops strategies to fulfill those requirements, including by "harvesting" information collected by DHS operating components. I&A works to identify homeland security information necessary to support Departmental, IC, and state, local, tribal, territorial, and private sector partner requirements while respecting rules governing civil liberties, civil rights, and privacy. The Contractor may be required to provide support to:

- a) Determining intelligence requirements of I&A, DHS Components, and state, local, tribal, territorial, and private sector partners, including receipt and processing of requests for information (RFIs) from DHS stakeholders.
- b) Determining and leveraging appropriate tasking mechanisms to request new collection in support of homeland security related intelligence requirements.
- c) Identifying Intelligence, Surveillance, and Reconnaissance (ISR) collection capabilities and other technical collections capabilities, gaps and limitations throughout the IC, DHS and its components to augment intelligence gaps.
- d) Satisfying intelligence information needs of other federal partners, including the Intelligence Community to enhance the DHS' information sharing initiatives.
- e) Maintaining awareness and managing the priorities of the "Homeland Security" Intelligence Topic as established under the National Intelligence Priorities Framework (NIPF) and ensuring DHS complies with National Security Policy Directive (NSPD)-26.
- f) Advanced Concept Technology Demonstration (ACTD) activities, including technological expertise, monitoring the development and

implementation of new technology for collection management and ISR applications, and advice to I&A about the development of future intelligence systems.

g) National Systems Integration Program (NSIP), including assisting DHS with integrating capabilities with the Intelligence Community and DoD in order to more effectively leverage technologies, tactics, techniques, and procedures to be used in future Homeland Security applications.

h) National Applications Office, including advocating and facilitating access to IC capabilities for its non-traditional civil, homeland security and law enforcement domain customers; developing mechanisms to monitor the satisfaction of information requirements; advocate for future collection and exploitation technology needs to support the civil applications, homeland security and law enforcement domains; and ensure the use of classified and unclassified information and systems is in accordance with laws and regulations.

3.2.1.3 Exercise Support and Continuity of Operations/Continuity of Government (COOP/COG)

DHS I&A requires support related to exercises and Continuity of Operations/Continuity of Government (COOP/COG) planning and preparation. The contractor may be required to provide support to:

a) I&A's activities related to the National Exercise Program for scenario development, planning and other expertise relevant to Operational Intelligence (OpIntel) for information sharing, coordination, collaboration, and integration within the Interagency environment and Intelligence Community for support to State and Local Fusion Centers and the DHS Intelligence Enterprise.

b) Planning, scheduling and designing, and controlling Homeland Security intelligence support to exercises at national, state, local, and tribal levels. Managing special programs (such as Focal Point) and special technical operations (STO), program directives, memos, and implementation plans.

c) Emergency preparedness, including developing COOP and COG contingency plans, processes, and procedures to facilitate the performance of I&A essential functions during any emergency situation that may disrupt normal operations.

d) Development of COOPs and Business Recovery Plans, communications and outreach support reports and technical documents reports, briefing materials, milestone charts, white papers, or other documents.

e) Support for planning and coordination of, and participation in National Security Special Events (NSSE) and Homeland Security Special Events (SEHS) levels 1 and 2, including coordination and

review of intelligence analysis for threat assessment in Integrated Federal Support Plans (IFSPs) for NSSE and SEHS.

3.2.1.4 International Relations

I&A requires support for interaction with international partners and management of information disclosure to international partners. The Contractor may be required to provide support to I&A's foreign liaison program, including:

- a) Developing and maintaining relationships with foreign partners; drafting policy papers; writing background and information papers and meeting notes; developing after action plans; planning and running analytical exchanges, foreign visits/functions; briefing senior US and foreign personnel, and other activities as needed.
- b) Processing requests for disclosures of DHS information to foreign partners, coordination with other agencies, inside and outside of the intelligence and law enforcement communities; maintaining permanent records of all disclosure-related decisions.

3.2.1.5 Information Management Support

Information management includes all matters concerned with the planning, design, development, installation, and implementation of information management architectures, policies, procedures, systems and applications. The contractor shall provide support as related to information sharing and collaboration, information requirements, information governance, information policy development, analysis, and solution implementation guidance.

The Contractor may be required to support:

- a) Ensuring information sharing and management elements of the DHS Strategic Plan are fully supported, including development and maintenance of information management processes.
- b) Ensuring that DHS complies with all requirements of the Information Sharing Environment Implementation Plan.
- c) Assisting in the development and management of tools for information sharing, researching, composing, producing, and disseminating intelligence and information products.
- d) Providing support to managing and assisting with negotiating formal and informal sharing agreements
- e) Developing information sharing and management requirements and documenting these requirements in a mission needs statement.
- f) Developing and implementing organizational architectures, execution plans, and program plans.

3.2.1.6 Counterintelligence (CI) Program Support

I&A's Counterintelligence (CI) Program support is intended to unify the CI strategy, policy, and operations of the Department. The contractor may be required to support:

- a) Development of the DHS CI strategy.
- b) Advice and support to develop a CI policy architecture for DHS.
- c) Planning and recommending steps for research technology protection.
- d) CI support to critical infrastructure protection, including coordination with analytic elements that focus on critical infrastructure and key resources.
- e) Research and analysis supporting CI force protection, CI operations, CI oversight, and functional counterintelligence.
- f) Research, analysis, and collaboration on general intelligence threats to DHS.

3.2.1.7 State and Local Fusion Centers Support

I&A supports the State and Local Fusion Centers (SLFC) by providing people and tools to the SLFCs to create a web of interconnected information nodes across the country that will ensure information is gathered from all relevant operations and fused with information from the Homeland Security Stakeholder Community. The Contractor may be required to support:

- a) Identifying and coordinating State and Local Program Office requirements with stakeholder communities.
- b) Development of information-sharing relationships with all partners.
- c) Improving understanding of legislation that affects the role of the State and Local Program Office, as well as current initiatives within the law enforcement community and endorsed by the major law enforcement organizations and associations.

3.2.1.8 Subject Matter Expert Support

The Contractor shall provide Subject Matter Experts (SME) who can provide advice and assistance on I&A's substantive missions or suggest innovative or creative approaches to address I&A's mission-related challenges. Such support may include:

- a) Studies, analyses and reports documenting developmental, consultative or implementation suggestions.
- b) Assistance with developing and maintaining liaison and collaborative relationships with DHS Components; State, Local, and Tribal partners; Intelligence Community (IC) members; other national, DoD, and law enforcement partners.
- c) Assistance and advice related to the implementation of policy, strategy, and guidelines, creation or revision of Concept of Operations,

Business Plans, and Implementation Plans, and standard operating procedures.

3.3 FUNCTIONAL CATEGORY 3--TRAINING SERVICES

3.3.1 Scope of Work:

The operational environment of I&A and the DHS IE is very dynamic in nature and thus the mission and training needs of the organizational components are constantly expanding. The scope of this effort requires the flexibility to address those expanding needs. The scope of the activities to be performed under this contract is categorized into five logical areas and described below.

The work described should not be construed in any way to be an outsourcing of inherently governmental functions. It is work that supports government personnel in the performance of their duties. Contractor personnel will not be in a position of decision-making authority that would bind the Government to take or not to take some action by contract, policy, regulation, monetary or otherwise.

3.3.1.1 Registrar Support

(a) The contractor shall provide registrar services for the recording, maintenance, updating, and oversight of all individual training records, monitoring of training progress, and scheduling of all training and education courses within the organization nationwide.

The Registrar function consists of three major parts:

- 1) Maintenance and updating of Training Records
- 2) Monitoring of training progress for personnel
- 3) Scheduling delivery of courses

(b) The contractor will utilize the DHS Learning Management System (LMS) when it comes on line in the near future. LMS will provide the capability of tracking and documenting training and education attended by all employees; and will be accessible across the Department. Until LMS becomes operational, the contractor will be required to perform such services and capture data manually.

3.3.1.2 Course Development Support

The Contractor, in coordination with the government, will develop new course curriculums and course content or revise existing ones that meet the training goals, mission and needs of the four "key customer" sets identified in Paragraph 2 above. Courses to be developed will span the range of various topics and functions that are relevant to the intelligence, law enforcement and homeland security environment. In addition to developing curriculum and content, the Contractor shall provide the following for each course:

- a) Syllabi, lesson plans and course objectives

- b) Writing assignments and exams with answer keys and solutions
- c) Study guides and practical exercises
- d) Instructor tips for teaching the course
- e) Identify materials and resources needed
- f) Course and Instructor evaluation

The contractor may also be required to assist in developing intelligence scenarios, ground truth documents, injects, and implementers for exercises to provide realistic and challenging experiences for participants which would validate and/or improve existing processes.

3.3.1.3 Training Delivery Support

The Contractor shall provide skilled and experienced professional trainers to deliver and offer courses via two methods:

- a) In-residence delivery at a central facility or locations within the National Capital Region appropriately cleared at the classification of the courses to be delivered
- b) Mobile training team (MTT) delivery at regional facilities and locations appropriately cleared at the classification level of the courses to be delivered, such as DHS- affiliated, DHS IE-affiliated or SLFC-affiliated training sites

The contractor will assist in developing I&A and DHS IE instructors as trainers with the intent of developing a "Train the Trainer" program.

3.3.1.4 Training Program Management Support

- a) The contractor shall assist in establishing guidelines and standards designed to professionalize and integrate the training programs. The contractor shall review existing policy and strategic documents and recommend changes to more fully professionalize and integrate the organization. The contractor shall also participate in drafting new training policies and other strategic training documents. In addition, the contractor will assist with facilitating periodic training to ensure that the organization is prepared to respond to threats to national security.
- b) The contractor will provide standardization and evaluation services for intra-departmental and interagency working groups and meetings for coordination and consistency in training issues and materials provided to federal and non-federal organizations.

- c) Standardization and evaluation services will include, but not be limited to, evaluating curricula; proposed standards and/or instructional opportunities; it will also include developing standards for training and education. Finally, the contractor will assist in reconciling intelligence community and law enforcement intelligence standards, in addition to proposing new standards that will be acceptable within both communities.

3.3.1.5 Distance Learning Support

The contractor shall have the capability to provide online distance learning functionality in order to facilitate greater access to I&A and DHS IE training courses. This capability will provide comprehensive functionality that includes communication features, content distribution, syllabus and course management, assessment, profile, management and other various support functions.

4.0 VENDOR QUESTIONS

Questions concerning this presolicitation notice must be submitted via e-mail to otis@dhs.gov and received by 10:00 a.m. on 6/3/09.

All timely questions received and responses to those questions will be provided to all vendors via a published notice, giving due regard to the proper protection of the identity of the questioner and proprietary information.

5.0 SUBMISSION FORMAT

Submissions in response to this notice should be organized into three sections: (1) Relevant Organizational Experience; (2) Performance-Based Experience; and (3) Quality Management. In addition, offerors should include a *brief* (not to exceed one page) cover letter with contact information (phone, fax and e-mail). The entire submission (excluding the cover letter) may not exceed twenty-five (25) pages in length.

Because each of the three functional award categories requires a unique experience and skill set, a separate submission for each functional category in which a vendor has an interest is required. Therefore, each submission must clearly identify the functional category to which it is applicable— Organizational Management Support (OMS), Core Intelligence Services, or Training Services. The government will provide a separate advisory response for each submission received.

Submissions must include seven (7) paper copies and two (2) electronic versions (each on a separate CD) to the address in Section 6.0. The entire response, including cover page, should be contained in a single document. The electronic

copies of the document must be submitted in a format readable by the Microsoft Office 2003 suite. CDs should be clearly labeled as to content.

Page limitations are based on single sided pages, 8 ½ X 11 inch paper, single spaced, Arial or Times New Roman typeface no smaller than 11-point (smaller fonts are acceptable for graphics, figures, tables, footnotes and legends), 1" margins. Costly, complex presentations are neither required nor desired.

6.0 SUBMISSION DATE, TIME, AND PLACE

Submissions must be *received* at the location designated below no later than 11:00 AM local time (Washington, DC) on XXXXXXXX. (Please note that we are not accepting submissions sent by e-mail or fax.) The government reserves the right to consider late submissions.

U. S. Department of Homeland Security - Office of Procurement Operations
Attn: Chiara Best, Contract Specialist
245 Murray Lane SW, Bldg 410
Washington, D.C. 20528-0001
Solicitation No. HSHQDC-09-R-00005

7.0 SUBMISSION CONTENT REQUIREMENTS

All submissions must include the following content:

7.1 Section 1--Relevant Organizational Experience

Organizational experience will be evaluated with respect to its relevance to the OTIS functional category to which the submission applies; and the quantity, complexity, and currency of such experience.

Vendors should identify confirmed teaming partners and subcontractors and the portion of work they are expected to perform, as the submission will be evaluated with respect to the relevance of the vendor's experience to the particular portion of work of the OTIS functional category that they are expected to perform. That is, the experience of the subcontractor/teaming partner is additive to that of the prime vendor. Each discrete example of organizational experience provided must be attributed to a specific team member and to an identifiable portion of the work to be performed under the applicable functional category.

Responses applicable to the functional category of Organizational Management Support (OMS) should reflect the intent of the government to award a single contract to a vendor with expertise across the categories to be supported under the OMS contract, as well as the ability to deliver the benefits of an integrated solution to the government. Responses applicable to the Core Intelligence Services and Training Services functional categories must address all categories

of contract activity as represented by the CLIN structure to be found in Section B of the draft RFP.

Vendors should provide narrative descriptions of efforts of verifiable organizational experience. The experience should be of the same scope and complexity in performing work of the same or very similar nature as that of the applicable OTIS functional category requirements.

Vendors should provide convincing examples of all such experience, with each discrete example providing the following:

- An explanation of how the experience was relevant—how it was of the same nature, scope, and complexity.
- The names of the government programs and services delivered and a specific contact point within the program who can verify such experience. Vendors should note that the government may seek validation of the experience claimed.

Vendors should also provide verifiable evidence of independent recognition of the quality of the work performed by the prime contractor.

Total organizational experience is limited to no more than fifteen (15) pages. Information submitted in excess of fifteen pages will not be considered.

7.2 Section 2--Performance-Based Experience

Performance-Based experience will be evaluated with respect to the prime vendor's prior or current successful experience in performance-based acquisitions as a prime contractor to the federal government. The Performance-Based experience of teaming members or subcontractors will not be considered for evaluation in this section.

Vendors should provide convincing examples of all such experience, with each discrete example providing the following:

- Name of government agency
- Contract instrument and identifier
- Contact name and phone number of government personnel who can verify the experience and its successful nature
- Description of the performance-based nature of the contract, and its period of performance
- Description of any incentives, metrics, or SLAs
- Description of how the effort was determined to be successful

7.3 Section 3--Quality Management

Quality management will be evaluated with respect to the existence of mature, comprehensive, institutionalized, and proactive methodologies and practices. The quality management of teaming members or subcontractors will not be considered for evaluation in this section.

Vendors should provide a convincing description of the quality management program it will employ in the performance of the OTIS contracts.

8.0 EVALUATION

8.1 Evaluation Process

The government intends to complete the advisory downselect process without communicating with the vendors that make submissions.

For the purpose of the government's assessment of the probable viability of a vendor's proposal in the OTIS procurement, Relevant Organizational Experience is significantly more important than Performance-Based Experience or Quality Management. To that end, the government will initially evaluate only the Relevant Organizational Experience section of submissions. An evaluation of Performance-Based Experience and Quality Management will only be conducted for those submissions where the Relevant Organizational Experience is assessed as "sufficient to be an indicator of capability and ability to successfully perform." To state in another way, if the evaluation of the Relevant Organizational Experience section of the submission results in a assessment of "insufficient," the submission will not be further evaluated and the vendor will be notified that it is unlikely to be a viable competitor.

However, vendors who are assessed as "sufficient" in Relevant Organizational Experience will also have to be assessed as "sufficient" in the remaining two sections in order to be invited to submit proposals in response to the RFP.

8.2 Evaluation Criteria

The government will evaluate each section of each submission in accordance with the criteria indicated in the following paragraphs. The government's assessment as to whether a vendor may be a viable competitor will be based on all information available to the evaluators.

8.2.1. Relevant Organizational Experience

Relevant Organizational Experience will be evaluated against the following criteria to assess whether or not it is sufficient to be an indicator of the vendor's capability and ability to successfully perform:

- Relevance of experience to the applicable OTIS requirement
- Complexity of experience comparable to the applicable OTIS requirement
- Depth and breadth of experience

The evaluation of Relevant Organizational Experience will result in an assessment of either "sufficient" or "insufficient" to indicate the capability and ability to successfully perform.

8.2.2 Performance-Based Experience

Performance-Based Experience will be evaluated against the following criteria to assess whether or not it is sufficient to be an indicator that the vendor can successfully perform a performance-based requirement:

- Adequacy of the experience with respect to the nature and complexity of the performance-based agreement
- Presence of incentives, metrics, and/or performance measures
- Successful nature of the performance

The evaluation of Performance-Based Experience will result in an assessment of either "sufficient" or "insufficient" to indicate the likelihood of successful performance-based tasks.

8.2.3 Quality Management

Quality Management will be evaluated against the following criteria to assess whether it is sufficient to be an indicator that the vendor has the thorough knowledge, the mature institutionalized processes in place, and the proactive quality management philosophy that will result in the sustained delivery of high-quality products and services:

- Presence of mature and institutionalized processes and methodologies
- Comprehensiveness of the processes
- Proactive nature of the quality management program

The evaluation of Quality Management will result in an assessment of either "sufficient" or "insufficient" to indicate the likelihood of the sustained delivery of high-quality products and services.

9.0 NOTIFICATION OF RESULTS

At the conclusion of the evaluation, each vendor that made a submission will receive a written notice from the Contracting Officer for each submission either inviting the vendor to submit a proposal in response to the formal solicitation, or that the vendor was judged as unlikely to be a viable competitor with respect to the applicable OTIS functional category. Vendors notified they are unlikely to be a viable competitor will also be informed of the general basis for that assessment.